



Indiana Pro Bono Commission
230 East Ohio Street, Suite 400
Indianapolis, IN 46204

**COMBINED 2009 DISTRICT REPORT, 2011 PRO BONO GRANT
APPLICATION, AND 2011 PLAN**

Pro Bono District7

Program Name: District 7 Pro Bono Corporation

Mailing Address: P. O. Box 3342

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Judicial Appointee: Honorable Joseph D. Trout

Plan Administrator: Sheriden Thompson

Names of Counties Served: Clay, Parke, Putnam, Sullivan, Vermillion and Vigo

Number and Percentage of volunteer attorneys (as defined on page 3) who rendered pro bono service to at least one low-income client during the year or who accepted a pro bono case in 2009 per registered attorneys in district, i.e. the district's pro bono participation rate:

279—8%

Please also provide pro bono participation rates by county, if available.

<u>County</u>	<u>Registered Attorneys</u>	<u>Volunteer Attorneys</u>	<u>Participation Rate</u>
Vigo	192	29	15%
Parke	11	2	2%
Sullivan	15	1	1%
Clay	17	1	1%
Putnam	33	2	1%
Vermillion	11	0	0%

Number of volunteer attorneys (as defined on page 3) who provided pro bono representation for at least 50 hours during 2009: 2

Number of potential clients requesting help in 2009 (limit this to actual intake done or sessions in which plan administrator or his/her delegate provided more than minimal assistance): 70

Number of potential clients who were actually provided with legal services (through volunteer attorney referral or assistance organized by the plan administrator) as a result of their request: 35: 1 Clay, 2 Parke, 2 Putnam, 1 Sullivan and 29 Vigo. Please provide this information by county, if available.

Amount of grant received for 2010: \$42,000.00

Amount of grant (2010 and prior years) projected to be unused as of 12/31/10: \$500.00

Amount requested for 2011: \$41,500.00

2011 PLAN SUMMARY

1. Please write a brief summary of the 2011 grant request. Please include information regarding your district's planned activities including committee meetings, training, attorney recognition, newspaper or magazine articles, marketing and promotion. The grant request should cover needs to be addressed, methods, target audience, anticipated outcomes, and how past difficulties will be addressed.

District 7 made significant strides to increase attorney participation in 2009. An e-mail list was provided by the Vigo County Bar Association and contacts were made according to the list. The response was greater than expected and case assignments increased.

In 2009 District 7 participated for the first time in Talk to a Lawyer Day. There were 5 volunteer attorneys who met with over 20 clients. The success of the program has prompted District 7 to continue the program on an annual basis.

District 7 also held a mortgage foreclosure seminar in August of 2009. The seminar was a success with 24 attorneys in attendance. A mortgage foreclosure seminar was held in Putnam County with 8 attorneys in attendance.

The District 7 board continues to meet quarterly. District 7's goal continues to be to identify ways to increase attorney participation. The target area for increased attorney participation is the rural communities that comprise Clay, Putnam, Sullivan and Vermillion counties. Attorney participation and case assignments are more difficult in these areas.

2009 REPORT OF VOLUNTEER ATTORNEY CASES IN DISTRICT 7

Please attach additional pages for each pro bono provider that receives IOLTA funding, whether directly or indirectly, in your district. See the sample additional pro bono provider page 3A. Please list one case per each line in the chart below. The information provided in this chart, and the charts immediately following, should be for the calendar year 2009 and not the fiscal year.

Definitions

Case: A legal matter referred to and accepted by a pro bono attorney volunteer. This includes mediation and GAL services.

Volunteer Attorney: An attorney who has rendered pro bono service to at least one low-income client during the year or accepted a pro bono referral from the identified program. This does not include attorneys who are in the list of pro bono volunteers but who have never taken a case. The case numbers do not include cases screened, only cases actually referred to a pro bono attorney. This also includes an attorney who has worked solely on a pending pro bono case that was neither opened nor closed during the reporting year. Volunteer attorneys for modest means programs may be counted, as long as they are separately identified as such.

Case Type: Please use the abbreviations listed in the Indiana Supreme Court Administrative Rule 8(B)(3) or any other defined abbreviation. Please be sure to include the mortgage foreclosure code of MF, if applicable.

Program Name (includes legal service provider, court, plan administrator, bar association, and other organizations or individuals): _____

IOLTA funding accounts for _____ of total pro bono provider budget. Please state the percentage of volunteers and cases which are attributable to IOLTA funding 0%. If this percentage is substantially more than the percentage of IOLTA funding, please explain.

Volunteer Attorney Name	County of Case	Was case pending at beginning of 2009?	Was case opened in 2009?	Was case closed in 2009?	Number of hours worked on case if closed in 2009 (include prior years' hours)	Case type
Brad Bough	Vigo	No	Yes	Yes	1	Benefit issue
Brad Bough	Vigo	No	Yes	No		
Brad Bough	Vigo	No	Yes	No		
Brad Bough	Vigo	No	Yes	No		
Brad Bough	Vigo	No	Yes	No		
Scott Skillman	Vigo	No	Yes	No		
Scott Skillman	Vigo	No	Yes	No		
Scott Skillman	Vigo	No	Yes	No		
TOTAL:	<i>No total needed</i>	TOTAL:	TOTAL:	TOTAL:	TOTAL:	<i>No total needed</i>

Program Name (includes legal service provider, court, plan administrator, bar association, and other organizations or individuals): _____

IOLTA funding accounts for ____% of total pro bono provider budget. Please state the percentage of volunteers and cases which are attributable to IOLTA funding _____. If this percentage is substantially more than the percentage of IOLTA funding, please explain.

Volunteer Attorney Name	County of Case	Was case pending at beginning of 2009?	Was case opened in 2009?	Was case closed in 2009?	Number of hours worked on case if closed in 2009 (include prior years' hours)	Case type
Dave Friedrich	Vigo	No	Yes	Yes	6	Ins
Dave Friedrich	Vigo	No	Yes	No		
Dave Friedrich	Vigo	No	Yes	No		
Dave Friedrich	Vigo	No	Yes	No		
Dave Friedrich	Vigo	No	Yes	No		
Chris Dailey	Vigo	No	Yes	No		
Chris Dailey	Vigo	No	Yes	No		
Daryl Felling	Clay	No	Yes	Yes	6	Guardshp
Daryl Felling	Putnam	No	Yes	No		
Daryl Felling	Putnam	No	Yes	No		
TC Clary	Vigo	No	Yes	No		
Joleen Klotz	Vigo	No	Yes	No		
Jeff Boyll	Vigo	No	Yes	No		
Arnold Brames	Sullivan	No	Yes	No		
Scott Craig	Vigo	No	Yes	No		
Scott Craig	Vigo	No	Yes	No		
John Wilkinson	Vigo	No	Yes	No		
Gary Hanner	Parke	No	Yes	No		
Gary Hanner	Parke	No	Yes	No		
Karen Swopes	Vigo	No	Yes	No		
Karen Swopes	Vigo	No	Yes	No		
Will Frankel	Vigo	No	Yes	No		
Will Frankel	Vigo	No	Yes	No		
Jon Spur	Vigo	No	Yes	No		
Bob Kondras	Vigo	No	Yes	No		
Laura Paul	Vigo	No	Yes	No		
Fred Bauer	Vigo	No	Yes	Yes	8	POA

2009 REPORT OF VOLUNTEER ATTORNEY LIMITED INFORMATION ACTIVITY IN DISTRICT 7

This limited legal information chart can include activities such as pro se clinics and call-in or walk-in informational services.

Please attach additional pages for each pro bono provider that receives IOLTA funding, whether directly or indirectly, in your district. See the sample additional pro bono provider page 4A. Please list each attorney only once in the volunteer attorney column but complete one line for each type of legal information activity for that attorney.

Program Name (includes legal service provider, court, plan administrator, bar association, and other organizations or individuals): Talk to a Lawyer Day

Volunteer Attorney Name	County	Type of Activity	Number of Hours
John Wilkinson	Vigo		4
Scott Craig	Vigo		4
Will Frankel	Vigo		4
TC Clary	Vigo		4
Mike Wright	Vigo		4
TOTAL:5			TOTAL:20

Program Name (includes legal service provider, court, plan administrator, bar association, and other organizations or individuals): Putnam County Help Desk

[illegible]

The help desk is open from 12:00 p.m. to 2:00 p.m.

2009 REPORT

Please list your District's 2009 activities—including committee meetings, training, attorney recognition, newspaper or magazine articles, marketing and promotion—in chronological order.

<u>Date</u>	<u>Activity</u>
1/2009	Talk to a Lawyer Day
3/2009	District 7 Quarterly Board Meeting
6/2009	Putnam County Mortgage Foreclosure Training (list attached)
6/2009	District 7 Quarterly Board Meeting
8/2009	Vigo County Mortgage Foreclosure Training (list attached)
9/2009	District 7 Quarterly Board Meeting
12/2009	District 7 Quarterly Board Meeting

Putnam County Mortgage Foreclosure Seminar Attendees:

**Cheryl Danberry
Harold Michael Goss
J. Lamont Harris
James Young
Jeff Bridges
John Zeiner
Karen Temple
Monica Fennell**

Vigo County Mortgage Foreclosure Seminar Attendees:

**Steven Cuvelier
Kelvin Roots
John Kesler
Ronald Jumps
James Sullivan
Robert McMahan
Misty McDonald
Sandy Jensen
Tracy Weber
Michael Wright
Michael Starkey
Tim Hayes
John Wilkinson
Donald Decker
B. Scott Skillman
Laine Auler
Tricia Rose Tanoos
Lori Howard
Jeffery Lewellyn
Robert Wright
Thomas S. Clary
James McDonald
Melony Sacopulos
Angela Bullock**

2009 REPORT

Please provide a short summary of how the provision of pro bono service is coordinated in your district, including the intake process, the relationships of pro bono providers in the districts, how referrals are made, and how reporting is done.

District 7 operates with 1 part-time staff member. The majority of District 7's intakes are done by phone. A client is pre-screened and if qualified an application is mailed out. Once the application is returned, the client is placed on a waiting list for assignment. If the case is urgent in nature an in person interview is scheduled. An intake is completed and the case is assigned to an attorney immediately.

District 7 has an open door policy. Walk-ins are always welcome during office hours.

Please describe any special circumstances affecting your District's 2009 implementation of its plan.

The district will be scheduling additional Talk to a Lawyer Days in an attempt to serve more clients and decrease the waiting list numbers. The programs will be scheduled in each of the District's 6 counties. Client services will also be improved with regular in person meetings with applicants and clients in rural areas.

BUDGETS for 2009, 2010 and 2011 for District # 7

Income Category	Final 2009 Income	2010 Actual Income To ____	2010 Budget	2011 Budget	Difference between 2010 and 2011
A. INCOME					
1. IOLTA Grant Amount	35,000	42,000	42,000	41,500	(500)
2. Previous year IOLTA grant carryover					
Other Income: <i>Explain source in narrative</i>					
3.					
4.					
5. Total Income (sum of lines A1-A4)	\$35,000	\$42,000	\$42,000	\$41,500	\$(500)
Expense Category	2009 Actual Expendi- -tures	2010 Actual Expenditures to 6/30	2010 Budget	2011 Budget	Difference between 2010 and 2011
B. PERSONNEL EXPENDITURES	20,000	10,000	20,000	20,000	0
1. Plan Administrator (Salary & FICA)					
2. Paralegals (Salary & FICA)					
3. Support Staff					
Other – Please Explain					
4. Employee Benefits					
a. Insurance (WC, Health, Life)		4,500	7,000	10,500	3,500
b. Retirement plans					
c. Other- Please Explain					
5. Total Personnel expenditures (sum of lines B1-B4c)	\$20,000	\$14,500	\$27,000	\$30,500	\$3,500
C. NON-PERSONNEL EXPENSES					
1. Occupancy (include utilities)	2,000	1,000	2,000	2,000	0
2. Equipment Rental					
3. Office Supplies	1,250		2,000	500	(1,500)
4. Telephone	1,500	825	2,000	1,500	(500)
5. Travel					
6. Training/Conferences		2,525			
7. Library/Info. Technology					
8. Malpractice Insurance/D&O insurance	2,200		2,000	2,500	500
9. Dues and Fees					
10. Marketing & promotion					
11. Attorney recognition	500			500	500
12. Litigation expenses	2,750	875	2,000	1,500	(500)
13. Equipment Acquisition					
14. Contract Services	4,000	2,200	2,500	2,500	0
15. Grants to other pro bono providers					
16. Other- Please Explain					
17. Total Non-Personnel Expenditures (sum of lines C1-C16)	14,200	7,452	12,500	11,000	(1,500)
D. TOTAL EXPENDITURES (sum of B5 & C17)	34,200	21,952	39,500	41,500	2,000
E. ENDING FUND BALANCE (A5 less D)	800	20,048	2,500	0	0

2011 Budget Narrative

Please provide descriptions of the following line items in the foregoing budget chart, by item number, in the space provided. Please explain any other budget entries that are not self-explanatory, including other sources of income and any significant deviation in requests from previous years.

Lines (B) (1), (2), (3), (4) Please indicate the number of hours per week for each personnel position, rate of pay, and all employee benefits.

District 7's plan administrator is part-time and earns \$20,000 annually. Ms. Thompson also has health insurance through District 7. The annual premium expense just increased from \$7,000 to \$10,500.

Line (C) (1) Please describe the occupancy cost in terms of square footage, utilities or other amenities and indicate whether the occupancy cost is above or below the market rate for that space.

District 7 leases an office from the Terre Haute law firm of Wright, Shagley & Lowery. District 7 pays Wright, Shagley & Lowery \$2,000 annually which is well below market rate.

Line

One supplemental, explanatory page may be added to the end of this report and plan.

ANNUAL TIMETABLE FOR IOLTA GRANT FORM SUBMISSION:
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January, April, July and October:	Quarterly IOLTA payments distributed
July 1:	Annual report, plan and grant application due to IPBC
November:	Notification of awards
December 1:	IBF grant agreement due and revised budget due